

Zetadocs Delivery

Powerful PDF emailing automation for Microsoft Dynamics[®] NAV



Consolidated batch delivery of NAV documents by email

All types of NAV report, including customer invoices and statements, can be converted into PDF format and delivered in batches.

Zetadocs retrieves each recipients' information directly from Dynamics NAV and based on their requirements and preferences, customers receive documents by email or printed statement. Multiple documents for the same recipient within a batch are grouped so they only receive one email.

Flexible delivery rules can overwrite the default NAV contacts on a per document basis, quotes can be sent to a different customer contact than invoices, or even add extra contacts as additional recipients, and set the From email address for each document type so that replies can be received to a different shared mailbox.

Consistent personalized content, every time

Zetadocs enables documents to be delivered with a professional appearance and consistent content, every time. Customized templates allow users to create email templates aligned with corporate branding and company logos.

Additional document attachments, such as T&Cs and other supporting documents, can be automatically appended to reduce time spent managing document delivery runs.

Store documents in SharePoint or network folders

Automated storage of delivered documents can be saved to a network folder, or indexed with metadata and stored in SharePoint, making it easier for colleagues outside of NAV to search for and find copies of sent documents. Ensuring customer information is available online for search and retrieval across the organization.

Further customization and scheduling of batches

Zetadocs Delivery Plus can be further customized to meet complex business rules and individual requirements. Invoices over a certain value could be copied to the sales director or can be programmed to switch the template and attachment that is automatically applied based on what's been invoiced. Automatically filing to a custom folder structure within the electronic archive can control access to sensitive documents.

At a glance

Email any NAV report as PDF files directly from Dynamics NAV

Deliver documents in batches that match customer's delivery preferences

Schedule batches automatically to be sent as background tasks

Consolidate multiple documents for the same recipient within a batch

Add attachments automatically such as T&Cs or other supporting documents

Automatically filed copies in SharePoint or network folders

Send from the NAV Web client or any of the NAV clients

Flexible delivery rules to add additional email recipients or set the From address

Customizable email templates guarantee consistent application of corporate branding

Assurance with CfMD - Certified for Microsoft Dynamics NAV 2016



Technical information

For details of supported platforms and other system requirements, please visit: www.equisys.com/zdnaveinfo

In addition to automating the processing of NAV documents in just a few clicks, Zetadocs Delivery Plus can also be customized to schedule the delivery of these personalized batches that run as background tasks. Zetadocs could also be programmed to automatically email customers with the details of their overdue account when a reminder level changes in NAV, or even bulk-email statements to each customer that has an overdue balance at the end of each month.

Advanced document management with our Electronic Invoicing solution

Our electronic invoicing solution is more than delivering invoices electronically. When combined with our Capture editions, Zetadocs becomes a powerful document management solution that centralizes all related inbound and outbound documents. Finance teams can store incoming documents against their relevant NAV records with a simple ‘Drag & Drop’ action or multi-user queues to link scanned documents. Once stored, documents can then be accessed on screen by both NAV and non-NAV users, shortening query times and improving customer service.

For more information, see our [Zetadocs for NAV Electronic Invoicing datasheet](#), or watch our [Electronic Invoicing video](#) on YouTube.

Features

| Delivering NAV documents with Zetadocs | Zetadocs Express | Delivery Essentials | Delivery Plus |
|------------------------------------------------------------------------------------------------------|------------------|---------------------|---------------|
| Email any NAV report as PDF directly from NAV, saving copies automatically to the electronic archive | ● | ● | ● |
| Deliver documents in batches by email or hard copy to match customer preferences | | ● | ● |
| Send from the NAV Web client or any of NAV’s HTML clients, in the office or on the go * | | ● | ● |
| Flexible delivery rules to add additional email recipients (To/Cc/Bcc) or set the From address | | ● | ● |
| Consolidate multiple documents to the same recipient within a batch, so they receive one email * | | ● | ● |
| Add attachments automatically such as terms & conditions or other supporting documents | | ● | ● |
| Personalized email subject and message using templates guarantees consistent delivery content | | ● | ● |
| File copies into configurable folders (date/customer/type) in an electronic archive | | ● | ● |
| Scheduled delivery of invoices or other NAV reports, sent in the background automatically ** | | | ● |
| Customizable to meet individual requirements using the Zetadocs Delivery SDK ** | | | ● |

* Dynamics NAV 2015 and later
 ** requires the additional purchase of Zetadocs Delivery Plus and customization by Equisys Solutions Partners using the SDK



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